

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
July 2017**

**Alexandra Taitano**

**BG Investment Services, Inc.  
111 W Chalan Santo Papa Drive  
6<sup>th</sup> Floor, Headquarters Building  
Hagatna, Guam 96910**

**Firm Contact:  
Danilo Rapadas  
Chief Compliance Officer**

**This brochure supplement provides information about Ms. Taitano that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Rapadas if you did not receive BG Investment Services, Inc's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Taitano is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2: Educational Background & Business Experience

**Alexandra Renee Leon Guerrero Taitano**

**Year of Birth:** 1983

**Educational Background:**

- 2006: University of Guam; Bachelors of Business Administration with a concentration in Entrepreneurship

**Business Background:**

- 11/2015 – Present BG Investment Services, Inc.; AVP/Wealth Management Advisor
- 05/2011 – 11/2015 Money Concepts Capital Corp; Financial Advisor
- 09/2009 – 05/2011 Bank of America; Financial Advisor
- 02/2007 – 04/2011 Merrill Lynch, Pierce, Fenner & Smith, Inc; Financial Advisor

**Exams, Licenses & Other Professional Designations:**

- 2008: Series 7 & 66 Exams
- 2009: Life & Health Insurance License
- 2010: Chartered Retirement Planning Counselor (CRPC®)

The Chartered Retirement Planning Counselor (CRPC®) is offered by The College for Financial Planning®. The CRPC Program focuses on the pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning Counselor<sup>SM</sup> and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®.

Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3: Disciplinary Information<sup>1</sup>**

There are no legal or disciplinary events material to the evaluation of Ms. Taitano.

### **Item 4: Other Business Activities**

Ms. Taitano is a licensed insurance agent. She may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation she and/or our supervised persons may earn.

### **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

### **Item 6: Supervision**

Mr. Rapadas, Chief Compliance Officer of BG Investment Services, Inc., supervises and monitors Ms. Taitano's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Rapadas if you have any questions about Ms. Taitano's brochure supplement at 671-472-5141.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Alexandra Taitano to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Alexandra Taitano to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.